

Monitoring Report

Template

Version 1.8 • 31 DEC 2012



NOTE: Please remove this page when creating a Monitoring Report deliverable.

Using This Template

The companion tool, **Monitoring Report Instructions**, provides detailed direction for completing this template. This and other Framework tools are available on the Framework Web site.

To create a deliverable from this template:

1. Delete the template title page (previous page) and this page.
2. Replace [bracketed text] on the cover page (next page) with your project and agency information.
3. Replace [bracketed text] in the tool header at the top of page 1 with the same project and agency information as on the cover page.

Note: Please do not remove or modify content in the footer area.

4. Complete the entire template. Each section contains abbreviated instructions, shown in italics, and tables for entering content. Relevant text from other project deliverables may be pasted into content areas.

Note: Please do not remove the italicized instructions.

NOTE: Please remove this page when creating a Monitoring Report deliverable.

TEXAS PROJECT DELIVERY FRAMEWORK
MONITORING REPORT



[Agency/Organization Name]
[PROJECT NAME]

REPORTING PERIOD: [STARTDATE MM/DD/YY] TO [ENDDATE MM/DD/YY]

VERSION: [VERSION NUMBER]

REVISION DATE: [MM/DD/YY]

Approval of the Monitoring Report indicates an understanding and acceptance of the project information included within this deliverable. By signing this deliverable, each individual agrees the project information is accurate, complete, and ready to be forwarded to the Quality Assurance Team (QAT).

Approver Name	Title	Signature	Date mm/dd/yy

Commented [PV1]: General comments:

-Please keep in mind that the QAT is the primary audience for the Monitoring Report.

-Please also note that the Monitoring Report is not a budget tracking tool. It is a high-level project status report.

-Follow the long-form instructions. Do not rely on the abbreviated instructions in this template.

-Complete header info.

-Follow submission requirements in the Instructions and the Handbook

-Make sure this is submitted as a searchable PDF.

-Include signatures or approval emails

-Use latest version of template on DIR website

Commented [PV2]: The Monitoring Report is due at the end of each period. Ex: If the reporting period ends Feb 28th, QAT expects to see a Monitoring Report 2-3 weeks from Feb 28th- sooner than later.

Be on time with your submissions!

If the project finishes between reporting periods, it is up to the agency if they would like to submit the report prior to the end of the reporting period or wait until the period is over. If the dollar amounts are finalized, it is acceptable to submit early.

You only need to submit this report until the final milestone is completed- usually the Go-Live or production roll-out date. You can submit final costs/benefits as part of the PIRBO.

Commented [PV3]:

At a minimum, you should have the Exec Sponsor, Technology Sponsor, and the Project Manager sign. The PM is responsible for collecting the information and using the information to monitor and control the project. The Sponsors are accountable for the accuracy of information, resource allocation, and ensuring that the project solves the business problems it was originally designed to do.

Section 1. General Information

Project Name		Reporting Period	
		Start Date mm/dd/yy	End Date mm/dd/yy
Agency			
Contact	Phone	Email	Fax
Project Manager	Phone	Email	Fax

Section 2. Project Cost, Schedule, and Accomplishments

2.1 Cost

Project Item	Report to Date
Initial Estimated Project Cost	
Last Reported Estimated Project Cost	
Current Estimated Project Cost	
Explanation of Variance between Last Reported and Current Project Cost	Don't forget to complete the variance if you had change requests. Also, is your variance 10% or more of the Initial Est. Project Cost? May need to re-submit business justification deliverables and/or contract amendment form.
Project Cost to Date (Fiscal)	
Project Cost to Date (Total)	
Description of Cost Tracking Mechanism	You should have a way to track both FTE costs and capital expenditures.

Commented [PV4]: QAT is interested in total project costs (not just requested capital): FTE costs, SW, HW, contractor services, network infrastructure, and all other costs to deliver the system into production.

Re-scope the project if your needs exceed your budget.

Commented [PV5]: Must be consistent with estimated project costs for development and implementation given in the Business Case Workbook (all costs anticipated to occur to get the system into production). Refer to line P28 in the Workbook.

Please note that the initial estimated project costs should NOT change for the duration of the project (should be the same for every Monitoring Report).

Note: The initial estimated project cost is used by QAT as a benchmark for cost performance.

2.2 Project Schedule

Project Item	Report to Date	
Initial Planned Project Start and Finish Dates mm/dd/yy		Baseline Date mm/dd/yy
Last Reported Project Start and Finish Dates mm/dd/yy	Baseline date: Provide the date the Last Reported Start and Finish dates were baselined.	Baseline Date mm/dd/yy
Current Estimated Project Start and Finish Dates mm/dd/yy		Baseline Date mm/dd/yy
Explanation of Variance between Last Reported and Current Start and Finish Dates		
Estimated Percentage of Project Complete	Do not base this on % of appropriated funds which have been expended!	

Commented [PV6]: The initial planned project start date should be you guessed it...when you originally planned to start the project. The planned start and finish dates are defined by the agency based on scope boundaries you set for the project. This is not always the date you expect to receive the project "approval letter" from QAT.

Many projects were started before Framework deliverables were reviewed and approved by QAT.

Note: The initial planned start and end dates are used by QAT as benchmarks for schedule performance.

The initial planned start and finish dates should not change. The original baseline date for these dates also should not change.

Project Item	Report to Date
Description of Method Used to Track Progress	Need a little more than "We use MS Project".
Description of Reporting Mechanism Used to Ensure that Project Participants and Management are Aware of the Project's Progress	Need a little more than "Stakeholder or Steering Committees are held". Roles and responsibilities must be defined, tracked, and updated throughout the life of the project! The communication plan is followed and updated, as necessary.

2.3 Accomplishments

Project Item	Report to Date
Accomplishments Achieved During this Reporting Period	You can include completion of milestones here.
Accomplishments Planned for Next Reporting Period	Should relate to future milestones.

Commented [PV7]:
Parking Lot: DIR/QAT is considering revising the instructions to include achievement of milestones as accomplishments.

Section 3. Milestones

Provide any background information that may be needed to clarify the milestone information provided in this section. List the project's major milestones, and the planned and actual start and finish dates (mm/dd/yy). Specifically include deliverables in relation to the milestones as identified in the Project Plan. Identify the percent complete for each deliverable.

Milestones: Background Information
You can include variances in Planned and Actual milestone dates in this section. We will consider modifying instructions to specify as such. Planned Start dates can change without affecting the Planned Finish Dates. Explain how you are going to accomplish this- more resources working on the tasks, scaled back scope, parallel vs sequential completion of tasks, etc.

Commented [PV8]: If you don't have a finalized Project Plan, use the milestones from your Business Case.

Project Milestones	Planned Start Date mm/dd/yy	Actual Start Date mm/dd/yy	Planned Finish Date mm/dd/yy	Actual Finish Date mm/dd/yy	Percentage Complete
Include project milestones, not just milestones for this period.			8/31/16		

Commented [PV9]:
Recommend including planning, development, and implementation milestones here, but we understand that milestones can vary from project to project. We also don't want all MS Project Milestones, but the ones that will affect the project completion date, overall scope, and budget if they are not completed on-time.

Commented [PV10]: Cross-out old dates if there are changes. Do not delete and rewrite. We need to see the history.

Commented [PV11]: There should be a correlation between % of milestones completed and overall % of project completed.

Section 4. Risks

Provide any background information that may be needed to clarify the project risk information provided in this section. List the current highest risk factors for the project and any actions taken to mitigate the risk.

Risks: Background Information

Risk Factor	Mitigation
Put the latest risk at the top.	

Commented [PV12]:
Parking Lot: For future releases of the Monitoring Report, DIR/QAT plan on adding a column to indicate whether the risk is open or closed in the future. Also H, M, L ratings.

Use this risk table with the other risk tables and risk matrices in the Framework.

Section 5. Project Changes

Provide any background information that may be needed to clarify the project change information provided in this section. Describe major project changes (e.g., scope, budget, system requirements, technology) that occurred during this reporting period. Describe actions for managing the project changes.

Project Changes: Background Information
You can elaborate on any of the variances described above or explain other changes to scope, budget, system requirements.

Change Description	Actions for Managing the Change
Put the latest change at the top.	More importantly, we are interested in the actions you plan to take to manage the changes: -Change control process -Prioritization of change requests (for a new project or phase) -Adding resources to complete new scope -Collapsing timelines to perform some tasks in parallel instead of sequentially

Commented [PV13]:
DIR plans to add a column indicating closure.

Section 6. Project Issues

Provide any background information that may be needed to clarify the project issues identified in this section. Identify major issues that are currently being addressed during this reporting period. Describe actions for managing each issue.

Project Issues: Background Information

Commented [PV14]:
It is interesting to note that QAT rarely receives Monitoring Reports with any issues listed. Yet, most of the projects in the portfolio have many issues.

Issue Description	Actions for Managing the Issue
Put the latest issue at the top.	

Commented [PV15]:
DIR/QAT plans to add a column to indicate closure.